

Purpose

Purpose

Manager Self-Service (MSS) is a single access point for Managers (or Supervisors) to find employee information and perform managerial tasks.

The **Universal Worklist (UWL)** is located on the main **My Work Overview-->Tasks and Alerts** page in MSS. Additionally, the UWL can also be accessed from the MySCEmployee Home Page and or within the HR Admin functions (used to initiate Personnel and OM Actions via interactive forms).

The UWL is similar to an "in-box" for work items (tasks) and notifications. A task requires an action (either additional transactional data or an approval). Notifications do not require an action, but are sent for informational purposes to users who need to be aware of an important process. The items and notifications are sent to the UWL by a workflow.

When users receive an item in their UWL, they will not be notified via email. Users who use the UWL and are part of a process that requires an action (especially an approval), must frequently log on to the MySCEmployee Portal and monitor incoming activity in their UWL. It is important to process any work items in a timely manner, as pending approvals from one person can vastly "bottle neck" an entire process!

UWL users can also assign a temporary 'Substitute' to receive and process their work items in the event they are unable to (for example, if they are on vacation, out sick, etc.).

Trigger

Use this service in Manager Self-Service (MSS) to process work items in the UWL or set up a substitution rule.

Prerequisites

- A MySCEmployee portal user ID.
- MSS users must hold the chief position in their department (organizational unit).
- MSS users must have an employee master record (e.g. a personnel number) in SAP with an active Communications Infotype record (IT0105).
- Applicable roles and authorizations (portal and SAP).

Menu Path

Use the following menu path(s) to begin this transaction:

- MySCEmployee Portal ➔ MSS ➔ My Work Overview ➔ Tasks and Alerts ➔ Universal Worklist (UWL)

Transaction Code

MSS

Helpful Hints

- Always navigate within the MySCEmployee portal (utilize the tabs, links, etc.). Do not use the 'Back' and 'Forward' buttons on the Internet Explorer (I.E.) toolbar, as they can give atypical results.

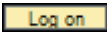
Procedure

1. Start all MSS application by logging on to the MySCEmployee Portal:



2. As required, complete/review the following fields:

| Field | R/O/C | Description |
|------------|-------|----------------------------------|
| User ID * | R | The MySCEmployee Portal User ID. |
| Password * | R | The employee's password. |

3. Click the Log on button .



After the user is logged on, the tabs on the main page will vary by user, depending on their roles and authorizations. For example, only managers will see a tab for Manager Self-Service (MSS) when they log on to the MySCEmployee portal.



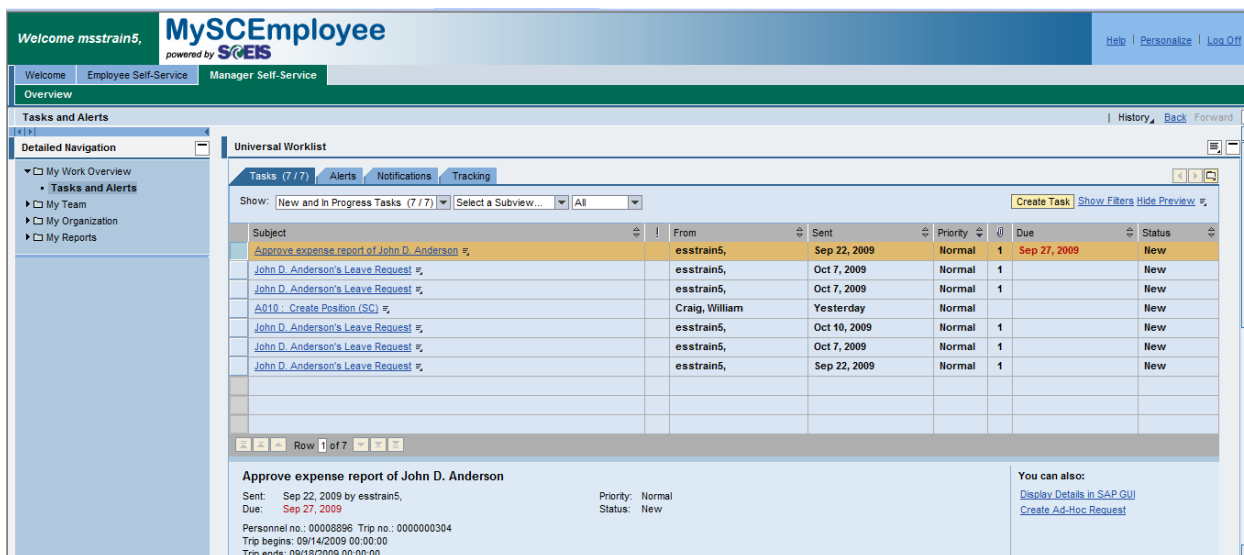
When using web applications that maintain or create data, always ensure you leave the application (or log off) when you complete your work. This will prevent record locking.

4. After logging on, the user will be defaulted to the MySCEmployee Home Page.

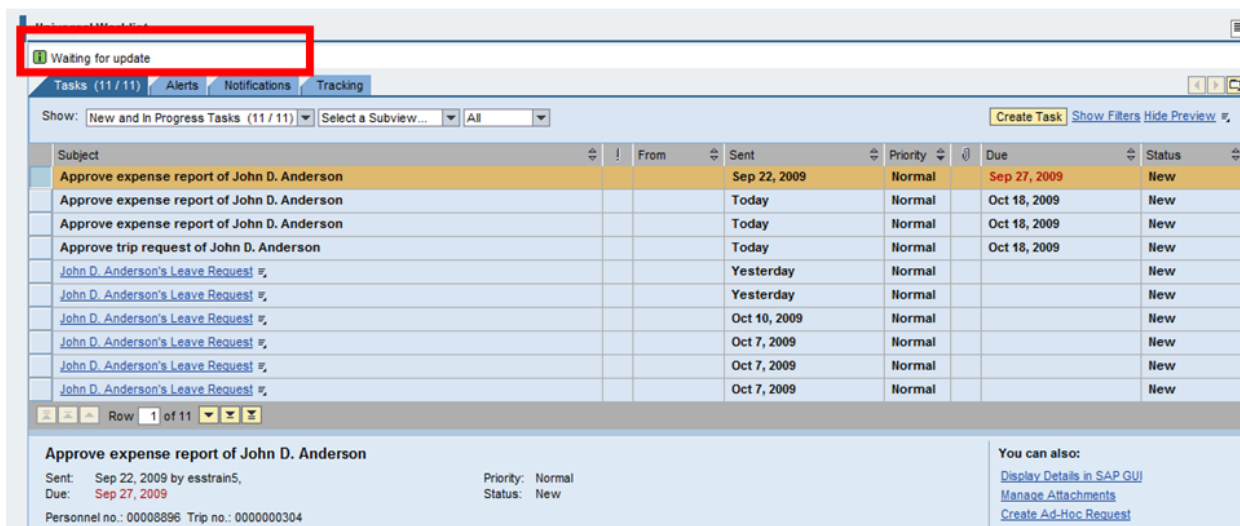



5. Click the **Manager Self-Service** tab.

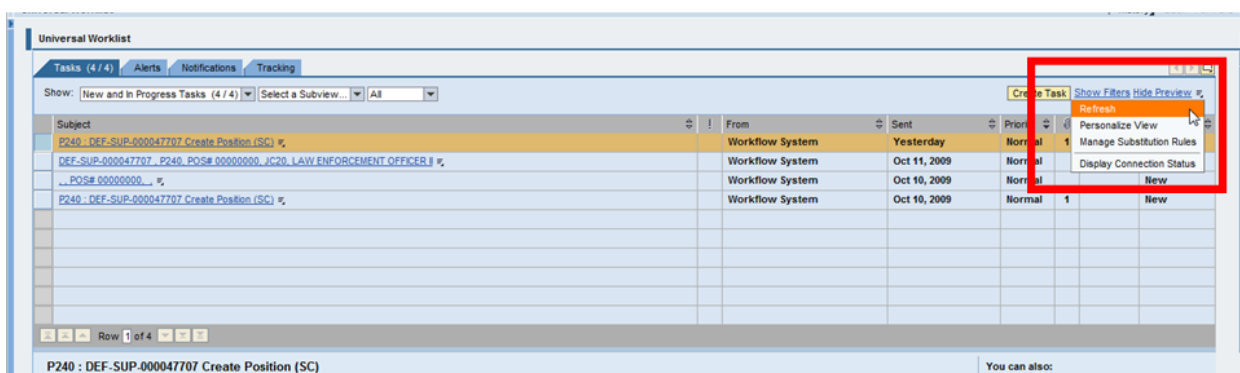
MSS users will be defaulted to the **'Tasks and Alerts'** page. The Universal Worklist (UWL) is the first work area the user will see when logging on to MSS.



5.1. When you first launch the UWL, it will generate the updates (new work items). This is indicated with the message "Waiting for Update." Wait until the message is gone before continuing. All new items will be refreshed in the worklist:




- 5.2. You can also Refresh the worklist at anytime to see any new work items. To refresh, click  then select 'Refresh' as shown below:



The two main tabs for the UWL are:

- **Tasks** - A task requires an action (either additional transactional data or an approval).
- **Notifications** - Notifications do not require an action, but are sent for informational purposes for users who need to be aware of an important process.

6. The UWL in-box includes the following columns:

| Column Name | Description |
|---|--|
| Subject | A description of the workflow task. The task is displayed as an active link. To open/access the tasks, click the link. |
| From | The User ID where the workflow task was routed from. |
| Sent | The date the workflow item was sent. |
| Priority | The priority level of the workflow task. |
|  - Number of Attachments | The number indicates the number of attachments included in the workflow. |

| | |
|--------|--|
| Due | The due date of a pending workflow task. If the date is past due, it will be displayed in red. |
| Status | The status of the workflow item. Any new (i.e. not previously opened or reviewed) will be displayed in bold. |

7. Select a work item, then scroll to the bottom to view additional details or access any attachments:

The screenshot shows the MySCEmployee portal interface. At the top, there's a navigation bar with 'Welcome msstrain5', 'MySCEmployee powered by SCS', and links for 'Help', 'Personalize', and 'Log Off'. Below this is a 'Tasks and Alerts' section with a 'Detailed Navigation' sidebar on the left. The main area displays a table of workflow tasks. The selected task is 'Approve expense report of John D. Anderson'.

| Task | Assignee | Due Date | Priority | Status | Count | Action |
|------------------------------------|----------------|--------------|----------|--------|-------|--------|
| A010 - Create Position (SC) # | Craig, William | Yesterday | Normal | | | New |
| John D. Anderson's Leave Request # | esstrain5 | Oct 10, 2009 | Normal | 1 | | New |
| John D. Anderson's Leave Request # | esstrain5 | Oct 7, 2009 | Normal | 1 | | New |
| John D. Anderson's Leave Request # | esstrain5 | Sep 22, 2009 | Normal | 1 | | New |

Row 1 of 7

Approve expense report of John D. Anderson

Sent: Sep 22, 2009 by esstrain5
Due: Sep 27, 2009
Priority: Normal
Status: New

Personnel no.: 00000896 Trip no.: 0000000304
Trip begins: 09/14/2009 00:00:00
Trip ends: 09/18/2009 00:00:00
Reason: SAP Training
Location: Charleston, SC
Country: US - South Carolina
Total costs: USD 1,015.83
Advance: USD 0.00

Attachments

| Type | Title |
|--------------|--------------------------|
| EmployeeTrip | EmployeeTrip: 0000000304 |

Open Task Forward Assign To Me

You can also:
[Display Details in SAP GUI](#)
[Create Ad-Hoc Request](#)



If a workflow item requires processing (Approval or Rejection), a new window with these options will be launched for processing.



To launch an attachment for a work item, click the corresponding link under the heading 'Attachments.'



Assign To Me - This button is used when a workflow is sent to several users who have the same role/authority to process the item (for example, to the Payroll Department). When this button is selected, that person is taking ownership of the work item. It will then appear only in that person's worklist. Therefore, that person will be responsible for completing the work task.



Any column in the worklist can be sorted. Go to the applicable column and click .

8. Assigning a Temporary Substitute for your Work Items

UWL users can also assign a temporary 'Substitute' to receive and process their work items in the event they are unable to (for example, if they are on vacation, out sick, etc.).

To assign a Substitute, scroll to the upper-right portion of the worklist and click the icon . Select 'Manage Substitution Rules' as shown below:

The screenshot shows the MySCEmployee portal interface. The 'Universal Worklist' is displayed with a table of tasks. A context menu is open over the first task, 'Approve expense report of John D. Anderson', with the 'Manage Substitution Rules' option highlighted.

| Subject | From | Sent | Priority | Due | Status |
|--|----------------|--------------|----------|-----|--------|
| Approve expense report of John D. Anderson | esstrain5 | Sep 22, 2009 | Normal | 1 | New |
| John D. Anderson's Leave Request | esstrain5 | Oct 7, 2009 | Normal | 1 | New |
| John D. Anderson's Leave Request | esstrain5 | Oct 7, 2009 | Normal | 1 | New |
| John D. Anderson's Leave Request | esstrain5 | Today | Normal | 1 | New |
| John D. Anderson's Leave Request | esstrain5 | Today | Normal | 1 | New |
| A010 - Create Position (SC) | Craig, William | Yesterday | Normal | | New |
| John D. Anderson's Leave Request | esstrain5 | Oct 10, 2009 | Normal | 1 | New |
| John D. Anderson's Leave Request | esstrain5 | Oct 7, 2009 | Normal | 1 | New |
| John D. Anderson's Leave Request | esstrain5 | Sep 22, 2009 | Normal | 1 | New |

Task Details for 'Approve expense report of John D. Anderson':
 Sent: Sep 22, 2009 by esstrain5
 Due: Sep 27, 2009
 Priority: Normal
 Status: New
 Personnel no.: 00000096 Trip no.: 0000000304
 Trip begins: 09/14/2009 00:00:00
 Trip ends: 09/18/2009 00:00:00

9. The following pop-up window will appear. Note: if you already have a substitution rule, it will be displayed in the table.

The 'Manage Substitution Rules' window provides instructions on how to manage task substitution rules. It includes a section for 'My Substitution Rules' with a table to view existing rules.

Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you can set an assignee to fill in for you (for example, in case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can also see other users' substitution rules involving you, and you can take over another user's tasks (if this user has allowed you to 'fill in').

My Substitution Rules

Buttons: [Create Rule...](#) [Delete](#) [Refresh](#)

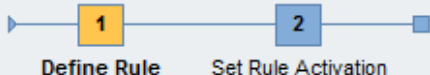
| Tasks | Nominee | What To Do | Status | Rule Activation |
|-------|---------|------------|--------|-----------------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Row 0 of 0

10. Click [Create Rule...](#).

Create a Substitution Rule

You can define which tasks you want to assign to a nominee. You can either make the nominee receive your tasks (for example, when you go on vacation), or you can allow the nominee to fill in for you (for example, in case you are unexpectedly absent)



1 Define Rule **2** Set Rule Activation

Nominee: Select...

Assign These Tasks: All

The nominee is the substitute for all tasks

I Want the Nominee To: ☒ Receive My Tasks

You hand over tasks to the nominee for the duration of your planned absence; in the next step you can set a start date for this rule

☐ Fill In For Me

If you are unexpectedly absent, the nominee can take over your tasks completely :

Next ▶ Cancel

11. Click 


Search For People

Search For Names:

ESSTRAIN4

Search

Current Selection

| |  | esstrain4. |
|--|---|------------|
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Apply

Cancel



Enter (or search) the USER ID of the person who you are assigning as the Substitute. You must know the person's User Id; you cannot search by name or personnel number.

12. Select the User ID and click **Apply**. The User Id will be defaulted into the 'Nominee' field (aka Substitute):

Create a Substitution Rule

You can define which tasks you want to assign to a nominee. You can either make the nominee receive your tasks (for example, when you go on vacation), or you can allow the nominee to fill in for you (for example, in case you are unexpectedly absent)

1 Define Rule 2 Set Rule Activation

Nominee: **Select...**

Assign These Tasks: **All**
The nominee is the substitute for all tasks

I Want the Nominee To: ☒ **Receive My Tasks**
You hand over tasks to the nominee for the duration of your planned absence; in the next step you can set a start date for this rule

☐ **Fill In For Me**
If you are unexpectedly absent, the nominee can take over your tasks completely

Next **Cancel**

13. Click **Next**.

Create a Substitution Rule

You can define which tasks you want to assign to a nominee. You can either make the nominee receive your tasks (for example, when you go on vacation), or you can allow the nominee to fill in for you (for example, in case you are unexpectedly absent)

1 Define Rule 2 Set Rule Activation

On saving, turn the following rule on: ☒ On - The rule will be enabled

☒ At Once

☐ On

☐ Off - The rule will not be enabled

You can turn the rule on or off at any time on the Substitution Rules Management screen.

[Previous](#) [Save](#) [Cancel](#)



Select the radio button for when the Substitute should start receiving your work tasks:

- At once
- On (enter a start date) - For example, the start date of your vacation.

14. Click [Save](#).

Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you can set an assignee to fill in for you (for example, in case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can also see other users' substitution rules involving you, and you can take over another user's tasks (if this user has allowed you to 'fill in').

| My Substitution Rules | | | | | |
|---|-------|-----------|-------------------|---------|---|
| Create Rule... Delete Refresh | | | | | |
| | Tasks | Nominee | What To Do | Status | Rule Activation |
| | All | esstrain4 | Receives my tasks | Ongoing | Successful Turn Off |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Row 1 of 1



When you return to work and wish to cancel the Substitution rule, you must come back to this function and click [Turn Off](#).

Result

You have processed work items in the UWL or set up a substitution rule.